

USDA Foreign Agricultural Service

# GAIN Report

Global Agricultural Information Network

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## India

### Oilseeds and Products Update

**November 2011**

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**Report Highlights:**

Favorable monsoon rains encouraged kharif planting of oilseeds. Soybean production is forecast to reach a record 11 million tons in marketing year (MY) 2011/12. While increased availability of oilseeds should push oil meal exports to 5.7 million tons, India's demand for edible oils continues to outpace supply. Imports of edible oil are forecast to reach 9 million tons in MY 2011/12. Planting of rapeseed and mustard increased 103,000 hectares compared to the previous year, reaching 5.6 million hectares.

**Post:**

New Delhi

**Author Defined:****SOYBEAN PRODUCTION EXPECTED TO REACH A RECORD 11 MILLION TONS**

According to the latest [Government of India \(GOI\) Ministry of Agriculture progressive planting report](#), the total area planted to kharif oilseeds (*minor oilseeds are not included*) was 14.9 million hectares, marginally higher than last year. Good monsoon rains promoted plant emergence throughout most of the growing areas. Farmers increased planting of soybean, cotton, rice, sugarcane and castor crops, showing relatively less interest in coarse cereals and pulse crops.

Soybeans were planted on a record 10.3 million hectares, an increase of 10.4 percent over the previous year. Favorable planting conditions helped extend the window for planting, contributing to higher kharif season soybean acreage in Madhya Pradesh, Maharashtra and Rajasthan. Based on preliminary field assessments, MY 2011/12 soybean production is forecast to reach a record 11 million tons. Kharif planting conditions were less favorable for peanut and sunflower. However, despite a 14 percent decrease in peanut kharif planting, MY 2011/12 production should reach 5.4 million tons from 5.3 million hectares. Similarly, assuming normal rabi season (winter sown) conditions, MY 2011/12 sunflower production is forecast at 625,000 tons from 1 million hectares.

**INITIAL DRY WEATHER CONDITIONS DIDN'T DETER RAPESEED-MUSTARD PLANTING**

According to the latest GOI Ministry of Agriculture planting estimate for rabi oilseeds, planting of rapeseed and mustard increased 103,000 hectares compared to the previous year, reaching 5.6 million hectares. Most of the increased acreage was in Rajasthan and Uttar Pradesh. Dry weather conditions, through October 2011, delayed planting in the major growing regions. However, good soil moisture conditions retained from recent monsoon rains had replenished soil moisture conditions and have recharged ground water levels, which had positively impacted planting of winter crops like rapeseed-mustard. Planting of rapeseed and mustard will be mostly complete by the end of November.

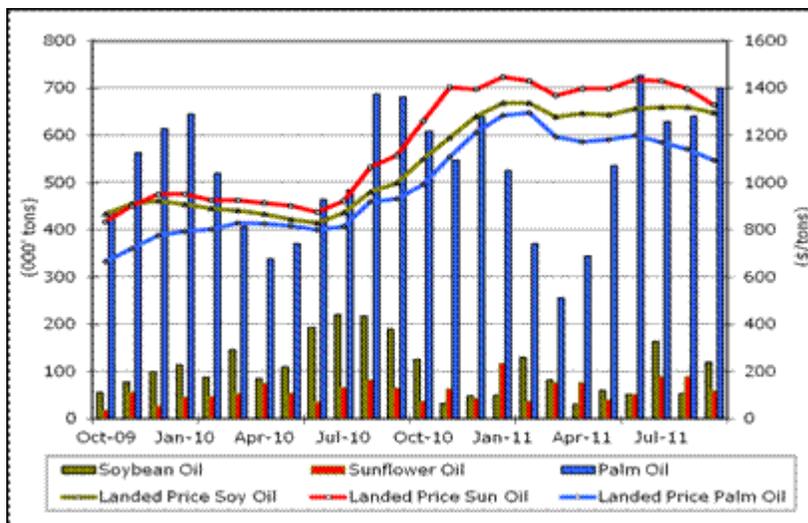
**EDIBLE OIL IMPORTS ARE FORECAST HIGHER AT 9 MILLION TONS**

Growing consumption, competitive international prices (Chart 1) and a zero import duty on crude edible oils will continue to encourage Indian imports of edible oil, particularly of palm oil. While the expected increase in domestic oilseed crushing could limit imports, MY 2011/12 edible oil imports are forecast to reach 9 million tons, up 9 percent over last year. The import basket includes 7.2 million tons of palm oil, 1 million tons of soybean oil, 800,000 tons of sunflower seed oil, and 40,000 tons of other edible oils. During the period October 2010 through September 2011, India imported 8.3 million tons edible oil, a 5 percent decline from the previous year (Table 1).

## OILMEAL EXPORTS ARE FORECAST AT 5.7 MILLION TONS

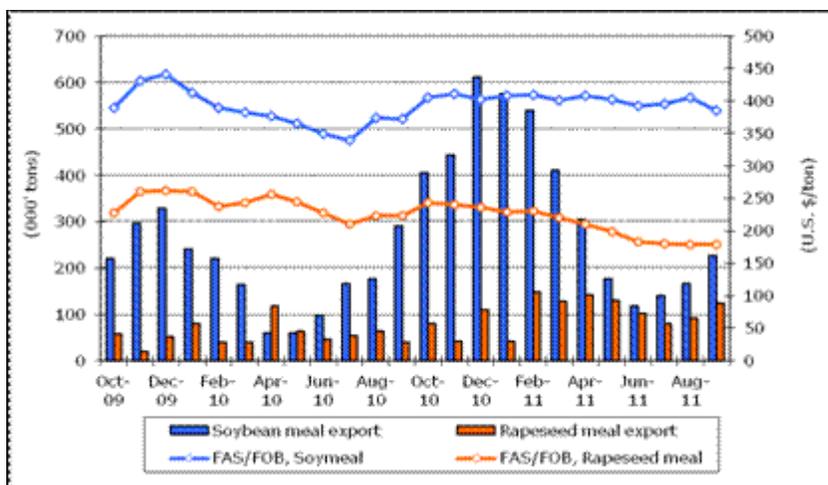
Assuming Indian oil meal remains competitive in global markets, MY 2011/12 oil meal exports (excluding rice bran and castor meal) are forecast to reach 5.7 million tons; marginally lower than the previous year. The export forecast includes 4.4 million tons of soymeal, 1.25 million tons of rapeseed meal and 10,000 tons of other oilmeals. However, growing domestic oilseed demand for feed and food use (especially soymeal) could limit export growth. Total oil meal exports in MY 2010/11 were up 52 percent, reaching 5.8 million tons (Table 2). Strong international prices encouraged Indian soy meal exports in MY 2010/11 (Chart 2).

**Chart 1. India: Imports and Landed price of Crude Soy, Sunflower and Palm Oils, In U.S. Dollar Per Metric Ton**



Source: Solvent Extractors' Association (SEA) of India and Industry Sources

**Chart 2. India: International Prices of Oilmeals and Exports, October 2009-September 2011, In U.S. dollar Per Metric Ton**



Source: SEA and Industry

**Table 1. India: Edible Oil Imports, October 2010-September 2011, In Thousand Metric Tons**

	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11	May-11	Jun-11	Jul-11	Aug-11	Sep-11	Oct 10-Sep 11	Oct 09-Sep 10	% Change
RBD palm-olein	132	71	108	119	90	74	26	64	87	98	82	143	1,094	1,169	6
Crude palm oil	476	477	525	398	276	180	316	467	625	521	549	549	5,359	5,135	4
Crude palm olein	0	0	0	0	0	0	0	0	0	0	0	0	0	4	100
Crude Palm kernel oil	11	10	6	8	5	1	2	4	14	10	9	7	87	109	20
<b>Total palm oil</b>	<b>619</b>	<b>557</b>	<b>639</b>	<b>525</b>	<b>371</b>	<b>255</b>	<b>344</b>	<b>535</b>	<b>727</b>	<b>629</b>	<b>640</b>	<b>700</b>	<b>6,541</b>	6,416	2
Crude soybean oil	125	32	49	50	130	81	31	61	51	164	52	120	945	1,598	41
Refined soybean oil	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total soy oil</b>	<b>125</b>	<b>32</b>	<b>49</b>	<b>50</b>	<b>130</b>	<b>81</b>	<b>31</b>	<b>61</b>	<b>51</b>	<b>164</b>	<b>52</b>	<b>120</b>	<b>945</b>	1,598	41
Crude sun oil	36	63	42	117	37	76	76	40	51	89	89	59	776	620	25
Refined sun oil	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total sun oil</b>	<b>36</b>	<b>63</b>	<b>42</b>	<b>117</b>	<b>37</b>	<b>76</b>	<b>76</b>	<b>40</b>	<b>51</b>	<b>89</b>	<b>89</b>	<b>59</b>	<b>776</b>	620	25
Canola Rape oil	0	0	0	0	0	0	0	0	0	0	4	0	4	18	0
Cottonseed Oil	0	0	0	0	0	0	0	0	0	0	0	0	0	9	0
Coconut oil	0	0	1	0	0	0	0	0	1	0	1	0	3	5	37
<b>Grand Total</b>	<b>781</b>	<b>652</b>	<b>730</b>	<b>692</b>	<b>538</b>	<b>412</b>	<b>452</b>	<b>636</b>	<b>829</b>	<b>882</b>	<b>786</b>	<b>879</b>	<b>8,268</b>	8,666	5

Source: Solvent Extractors' Association (SEA) of India // Note: figures in red indicate negative change

**Table 2. India: Oilmeal Exports, October 2010-September 2011, In Metric Tons**

	Soybean meal	Rapeseed meal	Peanut meal	Sunflower meal	Total
Oct-10	404,960	80,758	1,017	0	486,735
Nov-10	443,488	41,604	0	0	485,092
Dec-10	611,157	110,237	0	0	721,394
Jan-11	574,996	42,409	0	0	617,405
Feb-11	540,360	147,655	1,475	0	689,490
Mar-11	410,537	128,221	5,218	0	543,976
Apr-11	305,033	142,232	2,288	0	449,553
May-11	176,819	130,082	247	0	307,148
Jun-11	117,600	102,437	0	0	220,037
Jul-11	139,547	79,061	0	0	218,608
Aug-11	165,610	92,611	0	0	258,221
Sep-11	225,921	124,234	328	0	350,483
Surface Transport	450,000*	-	-	-	450,000
<b>Oct 10-Sep-11</b>	<b>4,566,028</b>	<b>1,221,541</b>	<b>10,573</b>	<b>0</b>	<b>5,798,142</b>
Oct 09-Sep-10	3,124,632	674,765	19,270	0	3,818,667
Percent Change	46	81	-45	-	52

**Table 3. India: Commodity, Oilseed, Soybean, PSD**

Oilseed, Soybean India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Area Planted	9,600	9,600	9,600	9,300	9,330	9,300	10,300	10,270	10,270	(1000 HA)
Area Harvested	9,600	9,600	9,600	9,300	9,330	9,300	10,270	10,270	10,270	(1000 HA)
Beginning Stocks	766	817	808	1,695	1,578	1,578	600	518	518	(1000 MT)
Production	9,700	9,700	9,700	9,800	9,800	9,800	10,600	10,600	11,000	(1000 MT)
MY Imports	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Supply	10,466	10,517	10,508	11,495	11,378	11,378	11,200	11,118	11,518	(1000 MT)
MY Exports	10	10	10	10	10	10	10	10	10	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Crush	7,500	7,500	7,500	9,600	9,400	9,400	9,600	9,400	9,600	(1000 MT)
Food Use Dom. Cons.	451	469	460	480	500	500	500	500	550	(1000 MT)
Feed Waste Dom. Cons.	810	960	960	805	950	950	825	1,000	1,000	(1000 MT)

Total Dom. Cons.	8,761	8,929	8,920	10,885	10,850	10,850	10,925	10,900	11,150	(1000 MT)
Ending Stocks	1,695	1,578	1,578	600	518	518	265	208	358	(1000 MT)
Total Distribution	10,466	10,517	10,508	11,495	11,378	11,378	11,200	11,118	11,518	(1000 MT)
CY Imports	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exports	10	0	0	10	0	0	10	10	10	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
TS=TD			0			0			0	

**Table 4. India: Commodity, Meal, Soybean, PSD**

Meal, Soybean India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Crush	7,500	7,500	7,500	9,600	9,400	9,400	9,600	9,400	9,600	(1000 MT)
Extr. Rate, 999,9999	1.	1.	0.8	1.	1.	0.8	1.	1.	0.8	(PERCENT)
Beginning Stocks	104	18	18	206	268	268	132	138	273	(1000 MT)
Production	5,985	6,000	6,000	7,660	7,520	7,520	7,660	7,500	7,680	(1000 MT)
MY Imports	9	0	0	6	0	0	6	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Supply	6,098	6,018	6,018	7,872	7,788	7,788	7,798	7,638	7,953	(1000 MT)
MY Exports	3,147	3,125	3,125	4,635	4,600	4,565	4,200	4,000	4,400	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	245	225	225	255	250	250	265	280	300	(1000 MT)
Feed Waste Dom. Cons.	2,500	2,400	2,400	2,850	2,800	2,700	3,175	3,000	3,000	(1000 MT)
Total Dom. Cons.	2,745	2,625	2,625	3,105	3,050	2,950	3,440	3,280	3,300	(1000 MT)
Ending Stocks	206	268	268	132	138	273	158	358	253	(1000 MT)
Total Distribution	6,098	6,018	6,018	7,872	7,788	7,788	7,798	7,638	7,953	(1000 MT)
CY Imports	9	0	0	6	0	0	6	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exports	3,850	2,914	2,914	4,400	3,600	3,600	4,200	3,800	3,800	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0		0	0	0	(1000 MT)
SME	2,745	2,625	2,625	3,105	3,050	2,950	3,440	3,280	3,300	(1000 MT)
TS=TD			0			0			0	

**Table 5. India: Commodity, Oil, Soybean, PSD**

Oil, Soybean India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Crush	7,500	7,500	7,500	9,600	9,400	9,400	9,600	9,400	9,600	(1000 MT)
Extr. Rate, 999.9999	0.	0.	0.176	0.	0.	0.1761	0.	0.	0.176	(PERCENT)
Beginning Stocks	103	103	98	229	303	303	237	250	295	(1000 MT)
Production	1,340	1,320	1,320	1,715	1,655	1,655	1,715	1,655	1,690	(1000 MT)
MY Imports	1,598	1,600	1,600	945	1,000	945	850	900	1,000	(1000 MT)
MY Imp. from U.S.	180	175	175	100	50	50	50	50	50	(1000 MT)
MY Imp. from EU	0	0	0	0	0		0	0	0	(1000 MT)
Total Supply	3,041	3,023	3,018	2,889	2,958	2,903	2,802	2,805	2,985	(1000 MT)
MY Exports	2	15	15	2	8	8	2	5	5	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	2,810	2,705	2,700	2,650	2,700	2,600	2,700	2,700	2,700	(1000 MT)
Feed Waste Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Dom. Cons.	2,810	2,705	2,700	2,650	2,700	2,600	2,700	2,700	2,700	(1000 MT)
Ending Stocks	229	303	303	237	250	295	100	100	280	(1000 MT)
Total Distribution	3,041	3,023	3,018	2,889	2,958	2,903	2,802	2,805	2,985	(1000 MT)
CY Imports	1,569	1,570	1,570	900	1,150	946	800	900	1,000	(1000 MT)
CY Imp. from U.S.	152	180	180	100	150	150	50	50	50	(1000 MT)
CY Exports	2	0	0	2	0	0	2	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
TS=TD			0			0			0	

**Table 6. India: Commodity, Oilseed, Peanut, PSD**

Oilseed, Peanut India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: May 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Area Planted	6,600	5,350	5,350	6,100	6,050	6,050	5,000	5,000	5,260	(1000 HA)
Area Harvested	5,300	5,350	5,350	6,000	6,000	6,000	5,000	5,000	5,260	(1000 HA)
Beginning Stocks	62	145	145	12	50	50	60	100	100	(1000 MT)





Feed Waste Dom. Cons.	96	67	67	96	45	45	96	85	95	(1000 MT)
Total Dom. Cons.	816	807	807	496	475	475	586	585	625	(1000 MT)
Ending Stocks	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Distribution	820	807	807	500	475	475	590	585	625	(1000 MT)
CY Imports	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exports	4	0	0	4	0	0	4	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
TS=TD			0			0			0	

**Table 10. India: Commodity, Meal, Sunflowerseed, PSD**

Meal, Sunflowerseed India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: May 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Crush	720	740	740	400	430	430	490	500	530	(1000 MT)
Extr. Rate, 999.9999	0.	0.	0.473	0.	0.	0.4767	0.	0.	0.4811	(PERCENT)
Beginning Stocks	0	0	0	0	0	0	0	0	0	(1000 MT)
Production	341	350	350	190	205	205	233	240	255	(1000 MT)
MY Imports	10	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Supply	351	350	350	190	205	205	233	240	255	(1000 MT)
MY Exports	2	0	0	0	0	0	0	0	0	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Feed Waste Dom. Cons.	349	350	350	190	205	205	233	240	255	(1000 MT)
Total Dom. Cons.	349	350	350	190	205	205	233	240	255	(1000 MT)
Ending Stocks	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Distribution	351	350	350	190	205	205	233	240	255	(1000 MT)
CY Imports	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exports	2	0	0	0	0	0	0	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
SME	330	330	330	179	194	194	220	227	241	(1000 MT)
TS=TD			0			0			0	

**Table 11. India: Commodity, Oil, Sunflowerseed, PSD**

Oil, Sunflowerseed India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: May 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Crush	720	740	750	400	430	430	490	500	530	(1000 MT)
Extr. Rate, 999.9999	0.	0.	0.36	0.	0.	0.3605	0.	0.	0.3604	(PERCENT)
Beginning Stocks	168	168	163	121	148	143	100	123	174	(1000 MT)
Production	255	270	270	142	155	155	174	180	191	(1000 MT)
MY Imports	611	610	610	776	720	776	825	800	800	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Supply	1,034	1,048	1,043	1,039	1,023	1,074	1,099	1,103	1,165	(1000 MT)

MY Exports	3	0	0	3	0	0	3	0	0	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Food Use Dom. Cons.	910	900	900	936	900	900	1,000	950	950	(1000 MT)
Feed Waste Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Dom. Cons.	910	900	900	936	900	900	1,000	950	950	(1000 MT)
Ending Stocks	121	148	143	100	123	174	96	153	215	(1000 MT)
Total Distribution	1,034	1,048	1,043	1,039	1,023	1,074	1,099	1,103	1,165	(1000 MT)
CY Imports	652	633	633	800	520	652	835	0	650	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exports	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
TS=TD			0			0			0	

**Table 12. India: Commodity, Oil, Palm, PSD**

Oil, Palm India	2009/2010			2010/2011			2011/2012			
	Market Year Begin: Oct 2009			Market Year Begin: Oct 2010			Market Year Begin: Oct 2011			
	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	USDA Official	Old Post	New Post	
Area Planted	0	0	0	0	0	0	0	0	0	(1000 HA)
Area Harvested	0	0	0	0	0	0	0	0	0	(1000 HA)
Trees	0	0	0	0	0	0	0	0	0	(1000 TREES)
Beginning Stocks	727	1,185	1,185	940	1,010	1,010	516	710	651	(1000 MT)
Production	50	50	50	50	60	60	50	60	60	(1000 MT)
MY Imports	6,603	6,415	6,415	6,661	6,600	6,541	7,250	7,200	7,200	(1000 MT)
MY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Imp. from EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Supply	7,380	7,650	7,650	7,651	7,670	7,611	7,816	7,970	7,911	(1000 MT)
MY Exports	0	0	0	0	0	0	0	0	0	(1000 MT)
MY Exp. to EU	0	0	0	0	0	0	0	0	0	(1000 MT)
Industrial Dom. Cons.	240	240	240	260	260	260	300	300	300	(1000 MT)
Food Use Dom. Cons.	6,200	6,400	6,400	6,875	6,700	6,700	7,400	7,200	7,200	(1000 MT)
Feed Waste Dom. Cons.	0	0	0	0	0	0	0	0	0	(1000 MT)
Total Dom. Cons.	6,440	6,640	6,640	7,135	6,960	6,960	7,700	7,500	7,500	(1000 MT)
Ending Stocks	940	1,010	1,010	516	710	651	116	470	411	(1000 MT)
Total Distribution	7,380	7,650	7,650	7,651	7,670	7,611	7,816	7,970	7,911	(1000 MT)
CY Imports	6,645	6,600	6,600	6,850	6,700	6,491	7,250	0	7,100	(1000 MT)
CY Imp. from U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exports	0	0	0	0	0	0	0	0	0	(1000 MT)
CY Exp. to U.S.	0	0	0	0	0	0	0	0	0	(1000 MT)
TS=TD			0			0			0	

